



State of California

Employment Training Panel

Arnold Schwarzenegger, Governor

December 1, 2009

Wolfgang Hack
Executive Vice President
Hill Partnership, Inc.
115 22nd Street
Newport Beach, CA 92663

Dear Mr. Hack:

RE: Final MONITORING VISIT REPORT FOR HILL PARTNERSHIP RETRAINING SB - ET08-0219

Date of the Visit:	9/17/09
Beginning/Ending Time:	1:00pm – 3:30pm
Date of Last Visit:	3/10/09
Visit Location:	Newport Beach, California
Persons in attendance:	Diana Bissell, Accountant, Hill Partnership, Inc. (HPI); and Suzanne Godin, ETP Contract Analyst
Action Required:	No

CONTRACT INFORMATION:

Term of Agreement:	10/08/07-10/07/09	Agreement Amount:	\$20,196
Training Start Date:	10/10/07	No. to Retain:	27
Date Training must be Completed:	7/07/09	Range of Hours:	8-60
Type of Trainee:	Retrainee	Weighted Ave. Hours:	34

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5353 Mission Center Road, Suite 110
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ETP (04/15/05)

FINAL REPORT SUMMARY:

• AGREEMENT HISTORY

Hill Partnership, Inc. (HPI) is a small business providing architectural, interior design, and planning services. The Agreement was approved at the September 2007 Panel Meeting and training began on 10/10/07. Ms. Bissell reported that all training was completed on 5/15/09 which allowed for the 90-day retention period to be completed by the term ending date of the Agreement (9/28/09). ETP approved one amendment revision during the term of the agreement that extended the term ending date by 12 months.

• INTERVIEW WITH THE CONTRACT REPRESENTATIVE, DIANA BISSELL

Ms. Bissell reported that the ETP-funded training had been a positive experience and that the company would not have been able to deliver the training in a formal structured manner without the assistance of ETP. The Revit architectural software training (computer skills) and the Commercial Skills training in LEED building standards provided your employees with the skills necessary to keep HPI competitive; and ultimately keeping your workers employed in the current economy. Ms. Bissell also added that the majority of the training was delivered by in-house training, which helped to keep your training costs down. The fourth quarter of 2008 and the first quarter of 2009 was an extremely slow time for the company; however, HPI used that time to ramp up its training schedule and deliver as much ETP-funded training as possible. Ms. Bissell added that the increased commercial and computer skill sets acquired during the training gave your employees the skills to perform multiple functions and work as lean as possible. Ms. Bissell further stated that the marketing skills training gave your employees the confidence and acumen to successfully market your company in the current economy. Interdepartmental communication has improved; your employees have begun functioning as a team, and they have an understanding of how one individual's performance (or lack of) affects the rest of the company.

Lastly, Ms. Bissell reported that the ETP on-line record keeping system was extremely user friendly and that Ms. Godin was always available to provide technical assistance when necessary.

PROJECT STATUS PROVIDED BY THE CONTRACTOR:

Trainees Started Training:	27	Completed Training:	24
Trainees Enrolled:	33	Completed Retention:	24
Dropped Following Enrollment:	9	In Retention Period:	0
No. Completed Minimum Reimbursable Hours :	24		

TRAINING STATUS:

Administrative Finding:

The ETP class/lab tracking system 10-Hour Report showed that one trainee had exceeded 10 hours of training per day on two separate days (11 hours on 4/21/09 and 12 hours on 4/22/09). Following a discussion and a review of training documentation, Ms. Bissell stated that the those hours were entered in error and that the trainee in question had completed 7 hours of training on each of those days. The contract analyst also interviewed the trainee who concurred that he had never attended more than 8 hours of training in one day.

However, it was discovered that HPI had billed for a final payment (placed) for this trainee and had been reimbursed for 60 class/lab training hours; therefore, Ms. Bissell was unable to make the necessary modifications to the class/lab tracking system and it initially appeared that HPI had been overpaid by 9 hours for the aforementioned trainee.

Following a further review by Ms. Godin, it was discovered that this retrainee had completed and documented more than the 75 training hours. Specifically, the Analyst verified through a review of training records that this retrainee had class/lab and training records filed in HPI's ETP training binder that totaled beyond the maximum 60 training hours specified in the Agreement by approximately 15 training hours. Therefore, the earned amount for this retrainee will not change as a result of this finding, and no action was necessary.

DISCUSSION OF PROJECTED EARNINGS:

The Agreement's training plan specified that trainees would be provided with a minimum of 8 to a maximum of 60 hours of class/lab training. 24 trainees (89% of planned retentions) completed the specified range of class/lab hours (8-60) and retention period. HPI tracked 186 more training hours on the ETP class/lab tracking system than can be reimbursed for due to the total amount of the Agreement. HPI is eligible to earn \$20,196 (100 percent of the encumbered amount) if all other agreement conditions are met. As of the date of this report, the Fiscal Closeout Invoice had been issued and HPI had received \$20,196 in earned progress payments.

SUBAGREEMENTS:

Training Vendor Subcontracts:

Training vendors performing ETP training?	Yes
If yes, is all training vendor information on file for training vendors who have provided training?	Yes
Has all vendor information been entered in the on-line ETP 100D for all vendors who have provided training?	Yes
Vendor information reviewed during meeting:	
<u>Microdesk, Inc.</u> Irvine, CA - \$2,535 for the delivery of class/lab training hours in Computer Skills for BIM/Revit Architectural Design Software.	

ATTENDANCE ROSTERS:

Attendance Rosters reviewed:	3/11/09-5/15/09	Rosters reviewed contained all the required information per Title 22, California Code of Regulations, Section 4442.	YES
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INVOICES:

Documentation reviewed was consistent with information reported on Invoices	1	Yes
Progress Payments	1, 2	Yes
Final Payment		N/A

AUDIT:

HPI will be notified in writing if this agreement is selected for an audit that will be conducted either at your site (field audit) or by telephone if selected for a desk audit (or "review"). These notifications will be sent in advance to allow ample preparation time and will include a list of documentation that will be examined by the auditor. A list of the documentation typically examined during an audit will be included along with the Audit Notification and Audit Confirmation letters. To provide support of training, original training attendance documentation is required; photocopied records are not acceptable.

Listed below are types of records typically requested during an ETP field audit:

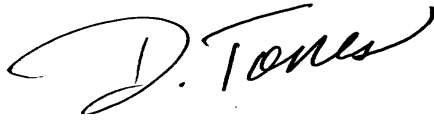
- Training attendance records such as rosters, sign-in sheets, etc.
- Payroll records of individual trainees to verify wage and hours worked
- Personnel records regarding occupation and dates of employment
- Documentation of employer paid health benefits (if applicable)
- Cash receipts to verify receipt and accounting of ETP funds

RECORD RETENTION:

Records must be retained within your control and be available for review at your place of business within the State of California. This responsibility will terminate no sooner than four (4) years from the date of the termination of the Agreement or three (3) years from the date of the last payment by ETP to the Contractor, or the date of resolution of appeals, audits, claims, exceptions, or litigation, whichever is later.

If you have any questions or comments regarding this report, please contact Suzanne Godin at (619) 686-1918 or at sgodin@etp.ca.gov within ten (10) working days from the receipt date of this letter.

Sincerely,

A handwritten signature in black ink, appearing to read "D. Torres".

Diana Torres, Manager
San Diego Regional Office

A handwritten signature in black ink, appearing to read "SMB".

Suzanne Godin, Contract Analyst
San Diego Field Office

cc: Diana Bissell, Accountant, HPI (via e-mail)
Maggie Menzel, Training Funding Source (via e-mail)
Kulbir Mayall, Fiscal Manager
Master File
Project File